

EDUCATION



“ In the first month, PLANERGY processed 435 invoices – that’s 435 we didn’t have to manually enter or scan. Multiply that by 12 and we are saving 16+ hours of work per month – at minimum. **”**

Oliver Phillips, CFO, Aspire Schools Trust

Aspire Schools Trust, a growing multi-academy trust (MAT) in Lincolnshire, recently embarked on a major digital transformation. With schools ranging from large secondaries to rural primaries, Aspire faced the challenge of managing purchasing and finance across diverse sites, each with their own habits and processes.

In 2024, they implemented **PLANERGY**, a cloud-based spend management platform that integrates seamlessly with Xero for Education. The result? Faster processes, improved visibility, reduced admin, and the confidence to manage £2.5 million in non-staffing costs with clarity and control.



The Challenge: Outdated Tools and Overloaded Teams

When Mr. Phillips joined Aspire as CFO, he immediately saw that existing systems, including PS Financials, were overcomplicated and underused.

"PSF is a very expensive piece of software — But it was like using a sledgehammer to crack a nut. Most schools weren't using even half of it,"

Oliver Phillips, CFO, Aspire Schools Trust

The purchasing process was heavily manual, with staff printing, signing, scanning, printing off barcodes and sticking them on invoices, which then had to be scanned and emailed. Budget holders lacked real-time visibility, and central finance struggled to see what was being spent and where.



"A lot of our procurement was driven by email chains and paper. We had pockets of people bypassing systems entirely. We were flying blind."

Oliver Phillips, CFO, Aspire Schools Trust

The Solution: A Streamlined Workflow With PLANERGY + Xero for Education

Aspire partnered with PLANERGY after a recommendation from the Xero for Education team. The trust prioritised three things: simplicity, integration, and speed.

"Xero for Education is our anchor software, so whatever we added had to plug into it seamlessly. PLANERGY showed us how to separate the procurement process from the accounting side while keeping full control and visibility,"

Oliver Phillips, CFO, Aspire Schools Trust

Within weeks, Aspire Schools Trust had:

- ✓ Migrated two years of supplier data into Xero for Education and PLANERGY
- ✓ Standardised workflows across schools
- ✓ Rolled out new approval structures for requisitioning and budgets
- ✓ Begun consolidating thousands of legacy suppliers into a leaner list

Results: Efficiency, Visibility, and Control

Time Savings Across the Board

By removing manual tasks like printing and re-scanning invoices, PLANERGY freed up hours of admin time. That time is now being reinvested in better supplier management and cost analysis.

"It's allowed us to free up staff to do more valuable work — like negotiating better contracts, rather than pushing paper. And if I got hit by a mail van tomorrow, the system would carry on without me — that's how it should be."

Oliver Phillips, CFO, Aspire Schools Trust

"We were never going to get efficiency without data. PLANERGY has given us the visibility we need to take a more informed, strategic approach to spending,"

Oliver Phillips, CFO, Aspire Schools Trust

The trust is now preparing to use PLANERGY to drive contract reviews and supplier consolidation — with real savings in sight.

"We had over 2,000 suppliers in our system — but only used about 60. We've already started consolidating, and our goal is to negotiate better pricing across fewer, more reliable vendors."

Oliver Phillips, CFO, Aspire Schools Trust

Real-Time Visibility and Better Decisions

PLANERGY allows Aspire's finance team to instantly see what's being ordered and by whom across all sites.

The PLANERGY Advantage for Multi-Academy Trusts

PLANERGY's design makes it a perfect fit for MATs like Aspire. Its True Cloud Architecture supports multiple school locations and workflows while keeping control centralised.

Unlimited users:

Teachers, budget holders, admin teams, and finance staff can all access what they need — without extra licensing costs.

Custom workflows:

Aspire tailored approvals to match the needs of both its primary and secondary schools.

User-friendly interface:

Teachers and Budget holders can view live data and track their own spend — without needing to become finance experts.

"Teachers don't need to know about budget codes or procurement frameworks. They just need to know: I asked for something, it's approved, and it's on the way, PLANERGY makes that possible."

Oliver Phillips, CFO, Aspire Schools Trust

Implementation: Fast, Painless, and Supported

Aspire's full implementation took around four weeks — without disrupting day-to-day operations.

“ We switched systems and everything just carried on. There was no delay in ordering or spending. It was smoother than I ever expected. The support from PLANERGY has been excellent.

Oliver Phillips, CFO, Aspire Schools Trust



With regular check-ins and on-demand help, the team was able to migrate data, configure workflows, and onboard users with minimal hassle.



“ Even being new in role, I was able to keep doing my job while implementation happened in the background.

Oliver Phillips, CFO, Aspire Schools Trust



Looking Ahead: Smarter Spend, Stronger Schools

Aspire is now using PLANERGY to prepare for the next phase: strategic procurement. By collecting line-by-line spend data, they're already seeing patterns and price increases — especially in catering.

“ We're inviting suppliers in, showing them the data, and asking for better deals. PLANERGY gives us the confidence and evidence to have those conversations.

Oliver Phillips, CFO, Aspire Schools Trust



With £2.5 million in non-staffing costs, even small percentage savings could mean tens of thousands redirected to the classroom.

“ I'd happily spend every pound each year if it means we're getting the best value for our pupils. PLANERGY helps us do that with confidence.

Oliver Phillips, CFO, Aspire Schools Trust



Final Thoughts

Aspire Schools Trust proves that with the right tools, even small MATs can unlock big savings and smarter spending — and put more of their budget where it matters most: in the classroom.



“ PLANERGY isn't just a bolt-on. It's a fundamental part of how we work now. It's saving us time, giving us visibility, and supporting better decisions. I'd recommend it to any MAT looking to modernise.

said Mr. Phillips.



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